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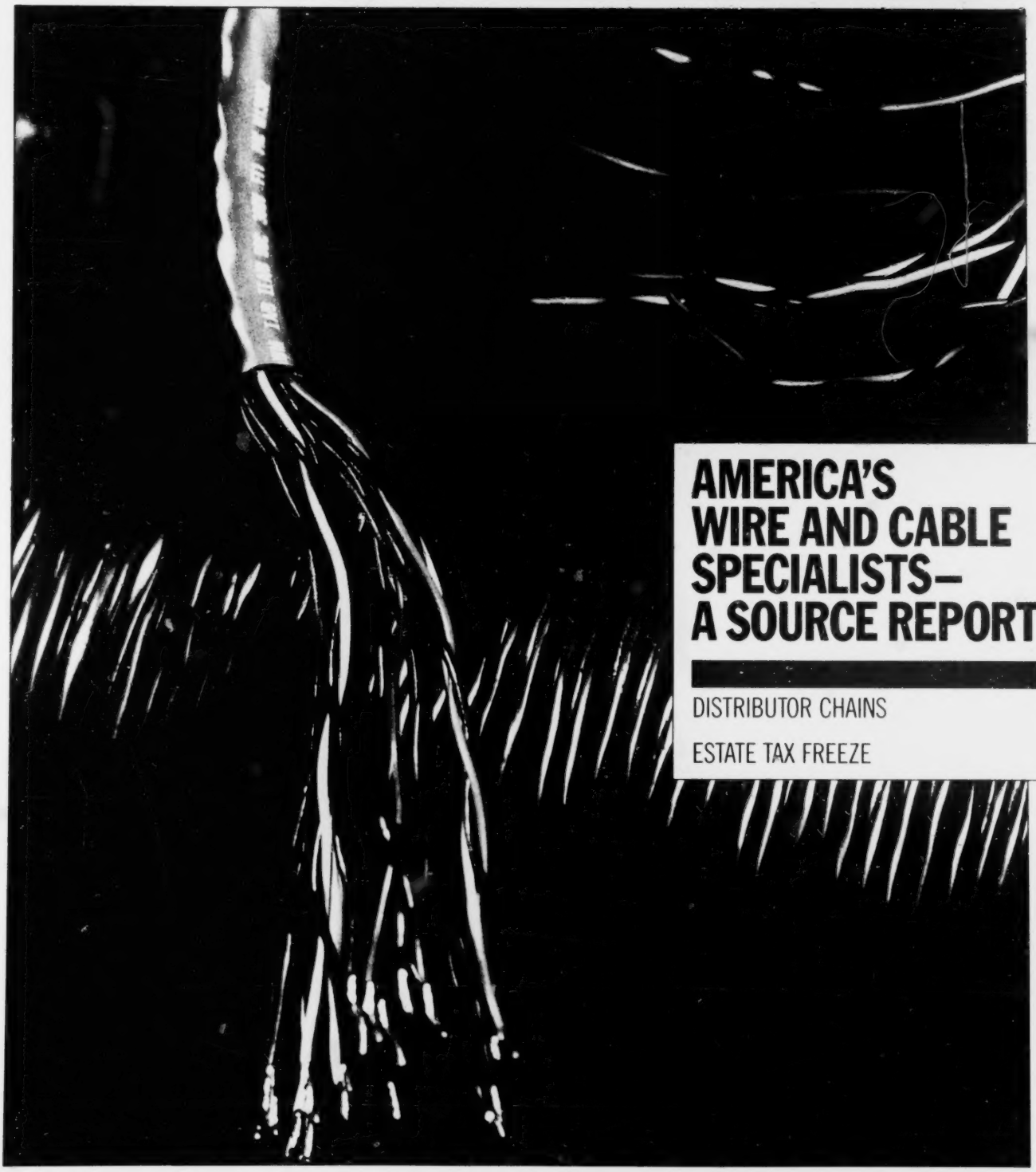
ELECTRICAL WHOLESALING



AMERICA'S WIRE AND CABLE SPECIALISTS— A SOURCE REPORT

DISTRIBUTOR CHAINS

ESTATE TAX FREEZE

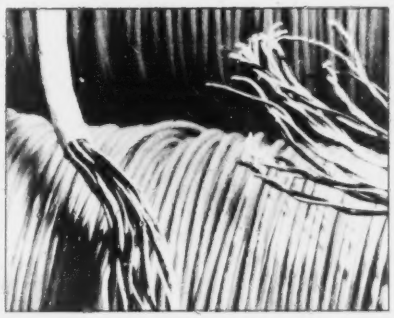
VOLUME 71
NUMBER 7

ELECTRICAL WHOLESALING

JULY
1990

FEATURES

COVER STORY



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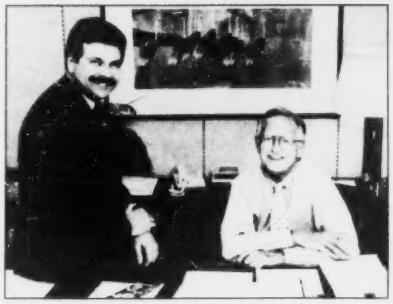

Richard Hathaway (left) and John Behmke

With this Publisher's Note, I am announcing my retirement as of July 1. I am taking leave of my job to give more time to my family and move to the West Coast.

The next Publisher's Note you read will be from Richard A. Hathaway, who succeeds me as group publisher of Intertec Publishing Corp.'s electrical magazine group.

The change will be imperceptible. I say this simply because Rich and I have worked so closely together over the past three-and-a-half years to improve ELECTRICAL WHOLESALING. We strive constantly to give our readers all the benefits of a dedicated magazine with a strong, independent voice in the industry.

I know personally how devoted Rich Hathaway is to maintaining that charter. He has helped to build the quality of the magazine and its wonderful staff, and he is the natural successor to the publisher's job.

Rich started his career in the magazine business some 20 years ago when he took a job as an editor. He was managing editor of *Industrial Distributor News* magazine for three years, and in 1978 joined McGraw-Hill as an advertising salesperson. In 1982, Rich joined the sales staff of *EC&M*. He accepted a management position in 1986 and was named associate publisher in January 1989.

"Seasoned" is the word for Rich. With 20 years in the publishing business, he is more than qualified to deal with the challenges in this new decade. He has both the reader and advertiser interests at heart. I am pleased to leave you in such capable hands.

John G. Behmke

JOHN G. BEHMKE

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CHAIN REPORT

ELECTRICAL DISTRIBUTOR CHAINS CONTINUE TO MULTIPLY AND EXTEND THEIR REACH.

■ Ever since the branch growth among independent electrical distributors got underway in the 1950s, chain watching has been an industry pastime. The chains, from those with coast-to-coast branch networks to those that barely qualify for chain status with five houses, command a sometimes disproportionate amount of attention from suppliers and fellow distributors alike.

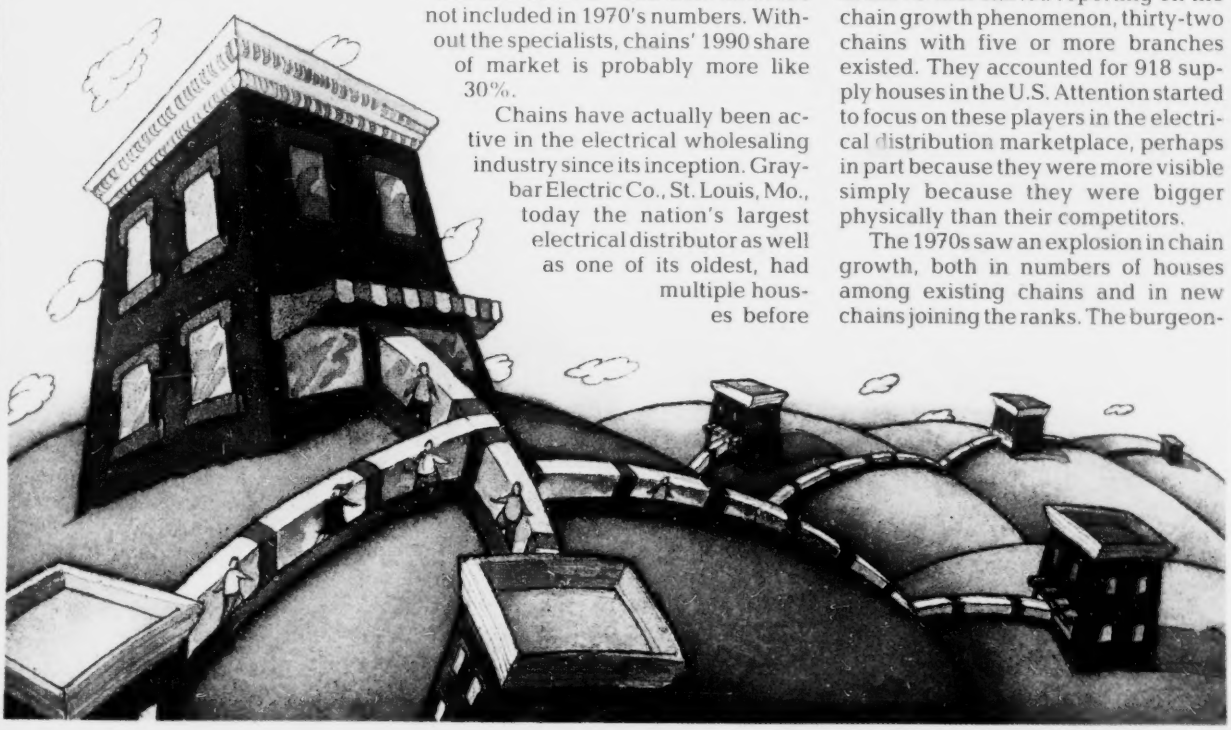
It's easy to see why. In just 20 years, the number of electrical distributor chains has risen from approximately 30 to at least 155 today. A less known—and more telling—fact is that in spite of the dramatic increase in the number of chains, their share of industry sales has not risen at all. It stood at 33% in 1970 and appears to be about 33% today, too. And the only reason the market share comes in that high in 1990 is the addition to the figures of specialized chains, such as wire and cable distributors like Houston Wire and Cable Inc., Houston, Tex., with 12 houses. Such companies were not considered part of the industry scene in 1970—a number of them didn't even exist at that time—and their sales are not included in 1970's numbers. Without the specialists, chains' 1990 share of market is probably more like 30%.

Chains have actually been active in the electrical wholesaling industry since its inception. Graybar Electric Co., St. Louis, Mo., today the nation's largest electrical distributor as well as one of its oldest, had multiple houses before World War I. The two manufacturer-owned chains, Westinghouse Electric Supply Co. (WESCO), Pittsburgh, Pa., and GE Supply Co., Bridgeport, Conn., started forming their networks in the 1920s.

The first few independent chains, regional in nature, came into being both before and after World War II. But it was not until the 1950s, with the post-war expansion, that significant growth in numbers of chains started to take place. By the 1960s chains had become factors in many of the key trading areas in the U.S. By the early 1970s, when ELECTRICAL WHOLESALING first started reporting on the chain growth phenomenon, thirty-two chains with five or more branches existed. They accounted for 918 supply houses in the U.S. Attention started to focus on these players in the electrical distribution marketplace, perhaps in part because they were more visible simply because they were bigger physically than their competitors.

The 1970s saw an explosion in chain growth, both in numbers of houses among existing chains and in new chains joining the ranks. The burgeon-

By Andrea Herbert, Chief Editor



ing of chain networks continued into the 1980s, giving rise to a new type, the super-regional chain. These firms spread their branches beyond one definable region, but stop short of being a truly "national" chain.

In the 1980s, a combination of factors contributed to the continued growth of chains. On the one hand, there were numerous companies available for sale—from one-house firms to large chains. Difficult business conditions—including back-to-back recessions and extended low inflation/slow growth—led a number of distributors into failure and prompted others to think seriously about getting out of the business. Likewise, a growing number of firms begun after World War II whose owners were going into retirement brought more companies onto the market that were available for purchase.

On the other hand, there were ready buyers as distributors developed an awareness of the need to be bigger. By achieving a certain critical mass, they could afford the computer systems and support services necessary to serve customers. Also, the emergence of buying groups on the industry scene seemed to fuel the desire to be bigger on the part of chains, whose clout the buying groups had set out to counter. In another vein, foreign investors discovered electrical distribution in the 1980s, bringing new buyers for wholesalers' businesses. These factors and more contributed to stepped-up branch growth and acquisition in recent years.

Today in 1990, the count of companies that operate as chains has reached at least 155, and there are undoubtedly some we've left out because they reached chain status without coming into our information sources. The specialized electrical distributor chains are especially difficult to track down; the listing here is definitely only a partial one. Combined, the chains listed on the following pages do an estimated $13 billion-plus in sales. They account for roughly 33% of electrical wholesaling industry sales, which approached $40 billion in 1989, and control 3,163 houses nationwide.

On the following pages, ELECTRICAL WHOLESALING lists most of the known chains active in the industry, by name and location. (For the most part, we do not include chains that sell electrical goods as a minor part of their business. Neither do we include chains within chains.) With the information in this article, it is possible to compare chains as to the size of their networks and their geographic coverage.

Also included for informational purposes are the companies' number of employees and 1989 sales volume, both for electrical products only. In some cases, the employee figures have been estimated by ELECTRICAL WHOLESALING, either because the firm supplied no employee data directly or because the distributorship does only a portion of its business in electrical supplies.

The chains are grouped in the accompanying table by what could be considered their philosophical approach to distribution. The categories include national chains, super-regional chains, regional chains, two-state chains, one-state chains and specialty chains. The players include:

> TODAY THE COUNT OF COMPANIES THAT OPERATE AS CHAINS HAS REACHED AT LEAST 155...(THEY) DO $13 BILLION-PLUS IN SALES.

The national chains. Biggest among the chains that reach from coast to coast with their networks, if measured by number of branches, is W.W. Grainger, Inc., Skokie, Ill., a distributor of motors and other electrical products with 331 houses. It is the only one to have houses in every state. It is closely followed by Consolidated Electrical Distributors, Inc.(CED), Westlake Village, Calif., with 300 houses. WESCO, with 225 locations, has the next largest network among the six national chains. Graybar, with 197 houses, comes next, followed by Anixter Bros., Inc., Skokie, Ill., a wire and cable distributor, with 146. GE Supply, with 130 houses, rounds out the list.

These six companies employ close to 20,000 people among them. Together they have 1,329 houses and generally compete in all or most of the 50 states, although some have houses in as few as 40 states.

The six companies do about $6.1 billion in sales, about 15% of the electrical wholesaling industry's sales.

Looking only at the "traditional" full-line electrical distributor national chains, the figures come out this way: Graybar, CED, WESCO and GE Supply have 852 houses and a combined sales volume of $4.4 billion, or about 11% of industry sales. This percentage share of the market held by the national chains has remained constant over the last five years. Together these companies employ approximately 13,800 people.

The super-regional chains. These networks spill over regional boundaries, extending into broad and sometimes far-flung areas. All-Phase Electric Supply Co., Benton Harbor, Mich., the largest of the super-regional chains in both branches and employees, exemplifies the super-regional approach. It has 102 locations in 19 states. Its houses concentrate down the center of the country from its Michigan origins south to the states on the Gulf Coast (including Texas) and into Florida and South Carolina, encompassing 12 states. It also has branches in the West in Washington, California and Colorado, as well as in the East in Rhode Island, Massachusetts, Virginia and Pennsylvania.

Noland Co., Newport News, Va., concentrates mainly in the Southeast, but also stretches into Texas, Maryland and West Virginia. With 95 houses, some part plumbing, heating, refrigerating and industrial supplies, it covers 13 states.

The Summers Group, Dallas, Tex., combines Summers Electric Co., which has branches in Texas and surrounding states as well as in the Southeast, with Glasco Electric Co. in Missouri, Illinois and Colorado and ESD Co. in California and Arizona. It has 83 houses in 11 states. This approach to chain formation—the combination of several formerly independent electrical wholesalers under one corporate umbrella—is one followed by several of the super-regional chains. EESCO, Inc., Chicago, Ill., and Consolidated Electric Supply (CES), Miami, Fla., have also formed larger networks by combining the operations of several companies that more or less retain their individual names in the marketplace. EESCO has 34 houses in nine states in the Midwest and South. CES concentrates in Florida, with other houses in Ohio, California and the Washington, D.C.-Maryland-Delaware area.

Crescent Electric Supply Co., East Dubuque, Ill., with 82 houses in 13

states, spreads its branches through the farm country of the upper Midwest, from Illinois and Michigan west to Montana and Colorado. It now has a presence in Arizona also.

Together these companies have 6,020 people and 452 houses. They do close to $1.75 billion in sales, approximately 4% of industry sales.

The regional chains. By ELECTRICAL WHOLESALING's rather arbitrary definition, a regional chain has five or more branches in three or more states. More often than not, these companies serve broad but definable geographic areas. However, in recent years chains have taken to jumping over nearby states to place a branch in a target market. At present, the number of regional chains operating in the industry appears to be 42, not counting chains within chains, such as the companies within the Summers Group.

With almost 9,200 employees and 538 houses among them, these distributors do about $2.6 billion in sales, close to 6.5% of the nation's business in electrical apparatus and supplies.

These companies can be found in just about every area of the country, but more of them seem to operate in the Southeast and on the Pacific coast than elsewhere.

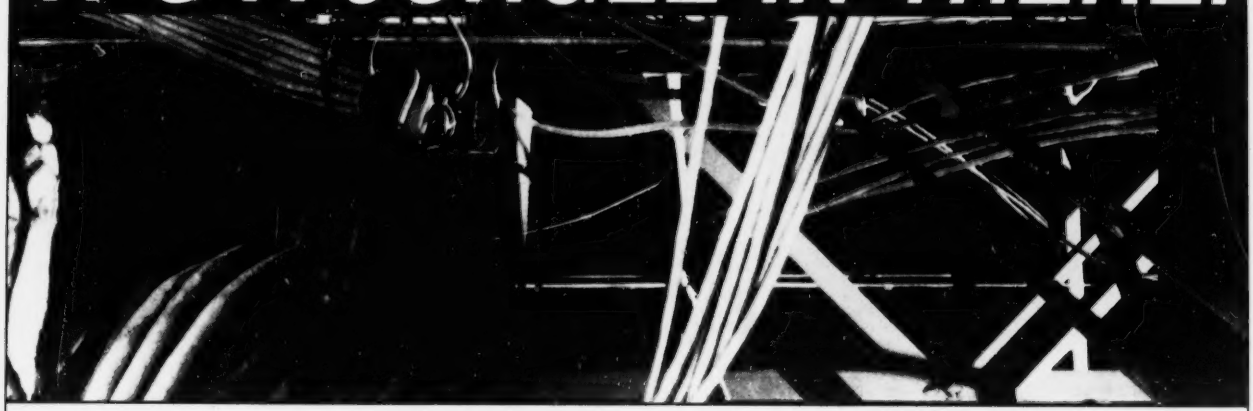
The two-state chains. These distributors operate five or more branches in just two states. Twenty-nine of them appear to be in business. Combined, they have 5,140 employees and 290 houses. Their sales volume probably amounts to $1.4 billion, or about 3.5% of industry sales. These chains operate in practically every state in the country, generally in two adjoining states. The largest among them is Hughes Supply, Inc., Orlando, Fla., which has 40 electrical houses in Florida and Georgia.

The one-state chains. These companies range in size from five houses to the largest among them, Dealers Electrical Supply Co., Waco, Tex., with 31 houses. But they all have one thing in common—they operate within one state's boundaries. We find 53 such chains in business today. They can be found in 25 states, but seem to be most common in California, Florida and Michigan. These 53 chains employ approximately 6,540 people and have 435 houses. Their sales volume probably approaches $1.8 billion, 4% or so of industry sales.

The specialty chains. The 16 chains (eighteen, if one counts Anixter Bros. and Grainger in this category) grouped under this heading tend to concentrate on the distribution of a type of product or related products; often they focus on specific customer markets as well. They tend to have multiple houses in multiple states, but usually only one per state, a different approach to distribution than most full-line chains take. The 16 companies probably employ close to 1,500 people and have 119 houses.

While this report has centered on the chains operating in the electrical wholesaling industry, it also puts a spotlight on the rest of the industry as well—the many firms that do business with one to four locations. While the chains have experienced considerable growth in their ranks and in their coverage, the rest of the industry has grown right in step with them. The chains may be more visible, and therefore generate more attention, but their share of the market remains much the same as it was 20 years ago. The smaller companies still do the bulk of the business in the electrical wholesaling industry. □

IT'S A JUNGLE IN THERE.



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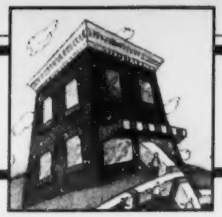

DISTRIBUTOR CHAINS

The national chains

COMPANY	HEADQUARTERS	LOCATIONS	STATES	EMPLOYEES	SALES*
W.W. Grainger, Inc.	Skokie, IL	331	50 In all states	2,200e	NA
Westinghouse Electric Supply Co.	Pittsburgh, PA	225	49 In all states except: Nevada	3,000e	NA
Graybar Electric Co., Inc.	St. Louis, MO	197	49 In all states except: Wyoming	4,764	$1,899.0
General Electric Supply Co.	Bridgeport, CT	130	42 In all states except: Delaware, Iowa, Mississippi, Nevada, North Dakota, Oregon, Rhode Island and South Dakota	2,300	NA
Consolidated Electrical Distributors, Inc.	Westlake Village, CA	300	40 In all states except: Alaska, Delaware, Massachusetts, Michigan, Minnesota, North Dakota, Pennsylvania, Rhode Island, South Dakota, Wyoming and West Virginia	3,700e	NA
Anixter Bros., Inc.	Skokie, IL	146	40 In all states except: Alaska, Delaware, Hawaii, Idaho, Mississippi, Montana, North Dakota, Rhode Island, South Dakota, Vermont and Wyoming	4,000	1,250.0

The super-regional chains

COMPANY	HEADQUARTERS	LOCATIONS	STATES	EMPLOYEES	SALES*
All-Phase Electric Supply Co.	Benton Harbor, MI	102	19 Michigan, Alabama, California, Colorado, Florida, Georgia, Indiana, Kentucky, Louisiana, Massachusetts, Mississippi, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Texas, Virginia, Washington	1,800	$450.0
Noland Co.	Newport News, VA	95	13 Virginia, Alabama, Arkansas, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Texas, West Virginia	264e	62.9
Crescent Electric Supply Co., Inc.	East Dubuque, IL	82	13 Illinois, Arizona, Colorado, Indiana, Iowa, Michigan, Minnesota, Missouri, Montana, Nebraska, South Dakota, Wisconsin, Wyoming	900e	NA
Summers Group	Dallas, TX	83	11 Texas, Arkansas, Arizona, California, Colorado, Georgia, Illinois, Louisiana, Missouri, New Mexico, Oklahoma	1,084	375.0
EESCO, Inc.	Chicago, IL	34	9 Illinois, Florida, Georgia, Indiana, Michigan, Minnesota, North Dakota, South Carolina, Wisconsin	810	260.0
Consolidated Electric Supply, Inc.	Miami, FL	56	7 Florida, California, Delaware, District of Columbia, Georgia, Maryland, Ohio	1,165	355.0

The regional chains

COMPANY	HEADQUARTERS	LOCATIONS	STATES	EMPLOYEES	SALES*
Stuart C. Irby Co.	Jackson, MS	19	9 Mississippi, Alabama, Arkansas, Florida, Kentucky, Louisiana, Oklahoma, Tennessee, Texas	490	$160.0
Southern Electric Supply Co., Inc.	Meridian, MS	32	6 Mississippi, Alabama, Florida, Louisiana, Oklahoma, Tennessee	425	100.0
Tvesco, Inc.	Memphis, TN	11	6 Tennessee, Arkansas, Georgia, Mississippi, North Carolina, Oklahoma	190	80.0
Platt Electric Supply, Inc.	Beaverton, OR	57	5 Oregon, California, Idaho, Nevada, Washington	670	133.0

COMPANY	HEADQUARTERS	LOCATIONS	STATES	EMPLOYEES	SALES*
Cameron and Barkley Co., Electrical Div.	Charleston, SC	30	5 South Carolina, Georgia, Kentucky, North Carolina, Tennessee	494	$161.0
American Electric Co.	St. Joseph, MO	15	5 Missouri, Colorado, Kansas, Nebraska, Oklahoma	179	NA
McJunkin Corp.	Charleston, WV	10	5 West Virginia, Illinois, Kentucky, Ohio, Pennsylvania	110	NA
Mayer Electric Supply Co., Inc.	Birmingham, AL	32	4 Alabama, Florida, Georgia, Tennessee	580	157.7
Tristate Electrical Supply Co., Inc.	Hagerstown, MD	22	4 Maryland, Pennsylvania, Virginia, West Virginia	288	98.4
Maddux Supply Co.	Greensboro, NC	10	4 North Carolina, Florida, South Carolina, Virginia	250e	NA
Kriz-Davis Co.	Grand Island, NE	10	4 Nebraska, Kansas, Missouri, Oklahoma	160	52.0
Debenham Electric Supply Co., Inc.	Anchorage, AK	10	4 Alaska, Nevada, Utah, Washington	135	39.0
Cardello Electric Supply Co.	Pittsburgh, PA	10	4 Pennsylvania, Florida, Ohio, West Virginia	118	24.0
Electrical Equipment Co.	Raleigh, NC	9	4 North Carolina, Georgia, South Carolina, Virginia	181	43.1
Border States Electric Supply Co.	Fargo, ND	9	4 North Dakota, Minnesota, Montana, South Dakota	210	NA
United Electric Supply Co., Inc.	New Castle, DE	7	4 Delaware, Maryland, New Jersey, Pennsylvania	180	NA
Heintz Electric Co.	Quincy, IL	5	4 Illinois, Iowa, Kansas, Missouri	60	NA
Branch Electric Co.	Forestville, MD	18	3 Maryland, Virginia, West Virginia	375	100.0
Kirby Risk Supply Co., Inc.	Lafayette, IN	17	3 Indiana, Illinois, Ohio	312	NA
Ralph Pill Electric Supply Co.	Boston, MA	15	3 Massachusetts, Maine, New Hampshire	172	NA
Wholesale Supply Group, Inc.	Cleveland, TN	15	3 Tennessee, Alabama, Georgia	60e	9.2
State Electric Supply Co., Inc.	Huntington, WV	13	3 West Virginia, Kentucky, Ohio	349	NA
Interstate Electric Supply Co., Inc.	Chantilly, VA	13	3 Virginia, District of Columbia, Maryland	221	51.5
ESSCO Wholesale Electric	Anaheim, CA	12	3 California, Arizona, Nevada	94	NA
Bryant Supply Co., Inc.	Gastonia, NC	12	3 North Carolina, Georgia, South Carolina	275	66.9
Stusser Electric Co.	Seattle, WA	12	3 Washington, Alaska, Oregon	235	62.0
Eck Supply Co.	Richmond, VA	12	3 Virginia, District of Columbia, South Carolina	205	47.5
Elliott Electric Supply, Inc.	Nacogdoches, TX	11	3 Texas, Louisiana, Oklahoma	125	21.4
Lappin Electric Co.	Milwaukee, WI	10	3 Wisconsin, Minnesota, Illinois	185	47.3
Massachusetts Gas & Electric Light Supply Co.	Boston, MA	8	3 Massachusetts, New Hampshire, Rhode Island	235	NA
Kulwin Electric Supply Co., Inc.	Indianapolis, IN	7	3 Indiana, Florida, Kentucky	103	32.0
Brown Wholesale Electric Co.	Sun Valley, CA	7	3 California, Arizona, Hawaii	220	85.0
Richards Electric Supply Co., Inc.	Cincinnati, OH	7	3 Ohio, Indiana, Kentucky	180	52.5
Raub Supply Co.	Lancaster, PA	7	3 Pennsylvania, New York, Virginia	50	NA
Electric Specialty & Supply Corp.	Boston, MA	6	3 Massachusetts, Connecticut, New Hampshire	114	37.9
J.H. Larson Electrical Co.	Golden Valley, MN	6	3 Minnesota, South Dakota, Wisconsin	121	31.0
Mack Electric Supply Co., Inc.	Dothan, AL	6	3 Alabama, Florida, Georgia	190	58.5
Warren Electric Co.	Houston, TX	6	3 Texas, Louisiana, Puerto Rico	250	87.9
McNaughton-McKay Electric Co.	Madison Heights, MI	5	3 Michigan, North Carolina, South Carolina	190	150.0
Tecot Electric Supply Co., Inc.	Wilmington, DE	5	3 Delaware, Maryland, Pennsylvania	130	29.0
Crum Electric Supply Co., Inc.	Casper, WY	5	3 Wyoming, Colorado, South Dakota	54	NA
Schindler Electric Supply Co.	Couer d'Alene, ID	5	3 Idaho, Oregon, Washington	32	NA

■ The two-state chains

COMPANY	HEADQUARTERS	LOCATIONS	STATES	EMPLOYEES	SALES*
Hughes Supply, Inc.	Orlando, FL	40	Florida, Georgia	900	$185.0
Ace Electric Supply Co.	Jacksonville, FL	23	Florida, Georgia	265	NA
North Coast Electric Co.	Bellevue, WA	23	Washington, Oregon	400	NA
Norcal Electric Supply, Inc.	Redding, CA	13	California, Nevada	150	NA
Nunn Electric Supply Corp.	Amarillo, TX	12	Texas, New Mexico	152	33.5
Butler Supply, Inc.	St. Louis, MO	12	Missouri, Illinois	108	20.0

COMPANY	HEADQUARTERS	LOCATIONS	STATES	EMPLOYEES	SALES*
The Hite Co.	Altoona, PA	11	Pennsylvania, New York	142	$30.4
Cummins Supply Co.	Ft. Worth, TX	10	Texas, Colorado	184	60.3
Viking Electric Supply, Inc.	St. Paul, MN	9	Minnesota, Wisconsin	180	NA
Philips & Co.	Columbia, MO	9	Missouri, Illinois	102	NA
Denney Electric Supply	Ambler, PA	8	Pennsylvania, Delaware	92	23.2
Stoneway Electric Supply	Seattle, WA	8	Washington, Idaho	123	33.0
Braid Electric Co.	Nashville, TN	8	Tennessee, Kentucky	140	NA
Western Extralite Co.	Kansas City, MO	8	Missouri, Kansas	NA	NA
United Electric Supply Co.	St. Louis, MO	6	Missouri, Illinois	120	NA
Plainsco, Inc.	Aberdeen, SD	6	South Dakota, North Dakota	125e	NA
Pacific Electrical Supply, Inc.	San Leandro, CA	6	California, Nevada	130	NA
Northland Electric Supply Co.	Minneapolis, MN	6	Minnesota, Wisconsin	144	49.1
Electrical Wholesale Supply Co., Inc.	Idaho Fall, ID	6	Idaho, Wyoming	45e	NA
Gerome Electric Supply Co.	Uniontown, PA	6	Pennsylvania, West Virginia	30e	NA
Rockingham Electrical Supply Co., Inc.	Newington, NH	5	New Hampshire, Maine	88	NA
Mosebach Electric & Supply Co.	Pittsburgh, PA	5	Pennsylvania, West Virginia	86	NA
Matthews Electric Supply Co., Inc.	Birmingham, AL	5	Alabama, Tennessee	99	NA
Moore Electric Supply Inc.	Charlotte, NC	5	North Carolina, South Carolina	135	51.8
Penn Electric Supply Group	Philadelphia, PA	5	Pennsylvania, New Jersey	200	51.0
Billows Electric Supply Co.	Philadelphia, PA	5	Pennsylvania, New Jersey	270	60.0
Eoff Electric Co.	Salem, OR	5	Oregon, Washington	180	55.0
City Hall Electrical Supply, Inc.	Providence, RI	5	Rhode Island, Massachusetts	100	22.0
Kendall Electric, Inc.	Battle Creek, MI	5	Michigan, Indiana	115	NA
Ryall Electric Supply Co.	Denver, CO	5	Colorado, Wyoming	138	NA
Industrial Electric Service Co.	Arcata, CA	5	California, Oregon	70	11.0
Holmes Distributors, Inc.	Portland, ME	5	Maine, New Hampshire	82	NA

The one-state chains

COMPANY	HEADQUARTERS	LOCATIONS	STATE	EMPLOYEES	SALES*
Dealers Electrical Supply Co.	Waco, TX	31	Texas	433	NA
City Electric Supply Co.	Mt. Dora, FL	22	Florida	120	$11.5
Raybro Electric Supplies, Inc.	Tampa, FL	20	Florida	414	107.9
Watson Electric Supply Co.	Dallas, TX	17	Texas	245	NA
Stanion Wholesale Electric Co.	Pratt, KS	16	Kansas	182	NA
Electric Supply Co. of Asheville, Inc.	Asheville, NC	12	North Carolina	125	NA
Keathley-Patterson Electric Co.	N. Little Rock, AR	12	Arkansas	120	30.0
Commerce Electric Supply Co.	Linthicum, MD	11	Maryland	111	NA
Electric Supply Co., Inc.	Raleigh, NC	10	North Carolina	185	NA
Madison Electric Co.	Detroit, MI	10	Michigan	198	NA
Controlco	Bakersfield, CA	10	California	NA	NA
Walters Wholesale Electric Co.	Long Beach, CA	9	California	200	57.0
Dardanella Electric Corp.	Arcadia, CA	9	California	120	50.2
Teche Electric Supply, Inc.	Lafayette, LA	9	Louisiana	70	NA
Standard Electric Co.	Bangor, ME	9	Maine	140	NA
Hunt Electric Supply Co.	Burlington, NC	9	North Carolina	75	16.0
Seattle Lighting & Fixture Co.	Seattle, WA	8	Washington	175e	NA
St. Louis-Metro Electric Supply, Inc.	St. Louis, MO	8	Missouri	57e	NA
Franklin Electric Co.	Atlantic City, NJ	8	New Jersey	85	21.0
Medler Electric Co.	Alma, MI	8	Michigan	94	NA
Standard Electric Co.	Saginaw, MI	8	Michigan	88	NA
City Electric Supply of California	Novato, CA	7	California	210	64.5
Peebles Supply Corp.	Newport News, VA	7	Virginia	55	NA
Electric Supply of Salinas	Salinas, CA	7	California	75	15.0
Electric Supply, Inc.	High Point, NC	7	North Carolina	84	20.0
Hein Electric Supply Co.	Milwaukee, WI	7	Wisconsin	40	NA
Roden Electrical Supply Co.	Knoxville, TN	6	Tennessee	75	NA
Springfield Electric Supply Co.	Springfield, IL	6	Illinois	145	42.8
Scott Electric Co.	Greensburg, PA	6	Pennsylvania	431	NA
Fitzpatrick Electric Supply Co., Inc.	Muskegon, MI	6	Michigan	145	NA
Basic Distribution Corp.	Columbus, OH	6	Ohio	84	NA
Electrical Wholesalers	Hartford, CT	6	Connecticut	140	NA
Independent Electric Supply, Inc.	San Carlos, CA	6	California	170e	NA
Friedman Electric Group, Inc.	Exeter, PA	6	Pennsylvania	125	NA
Lupia Electric Supply, Inc.	Ogdensburg, NY	6	New York	30e	NA
Brown's Electrical Supply Co., Inc.	Anchorage, AK	5	Alaska	38	NA

COMPANY	HEADQUARTERS	LOCATIONS	STATE	EMPLOYEES	SALES*
Electrical Distributors Inc.	Charlotte, NC	5	North Carolina	53	12.0
Brock-McVey Supply Co.	Lexington, KY	5	Kentucky	66	NA
Shepherd Electric Supply Co., Inc.	Goldsboro, NC	5	North Carolina	80	$18.0
The Furbay Electric Supply Co.	Canton, OH	5	Ohio	73	NA
K & M Electric Supply, Inc.	Riviera Beach, FL	5	Florida	79	NA
Michigan Chandelier Co.	Southfield, MI	5	Michigan	64e	14.2
Coleman Electrical Supply Co., Inc.	Brooklyn, NY	5	New York	75	NA
Fischer-Flack, Inc.	Saginaw, MI	5	Michigan	93	NA
Minnesota Electric Supply Co.	Willmar, MN	5	Minnesota	65	NA
Hunzicker Brothers, Inc.	Oklahoma City, OK	5	Oklahoma	93	NA
Evergreen Oak Electric Supply & Sales Co., Inc.	Crestwood, IL	5	Illinois	185	32.0
McDonald Distributors of Florida, Inc.	Ft. Lauderdale, FL	5	Florida	90	24.4
Coast Electric Co.	San Diego, CA	5	California	103	35.0
Bergenfield Lighting & Electrical Supplies	Bergenfield, NJ	5	New Jersey	230	51.0
Colotex Electric Supply Co.	Loveland, CO	5	Colorado	38	NA
Diamond Electric Supply	Caro, MI	5	Michigan	28e	NA
All City Electric Supply	Artesia, CA	5	California	40e	NA

■ The specialty chains

COMPANY	HEADQUARTERS	LOCATIONS	STATES		EMPLOYEES	SALES*
Champion, Inc.	Iron Mountain, MI	5	4	Michigan, Minnesota, Ohio, Wisconsin	NA	NA
Electrical Insulation Suppliers, Pacific Div.	San Jose, CA	12	7	California, Arizona, Colorado, Oregon, Texas, Utah, Washington	82	NA
GNWC Wire	Downers Grove, Ill.	12	11	Illinois, Alabama, Arizona, California, Colorado, Florida, Massachusetts, New Jersey, North Carolina, Ohio, Texas	40	$7.0
Grote Lighting & Supply Co., Inc.	Indianapolis, IN	8	7	Indiana, Arizona, Florida, Kentucky, Michigan, Ohio, Pennsylvania	64	NA
Houston Wire & Cable Co.	Houston, TX	12	9	Texas, California, Florida, Illinois, Louisiana, New Hampshire, North Carolina, Pennsylvania, Washington	300	NA
I/O Corp.	Conshohocken, PA			Pennsylvania, Florida, New York, North Carolina, Ohio		
King Wire & Cable Corp.	Jamaica, NY	5	5	New York, Arizona, Florida, Ohio, Texas	150	50.0
Lakeland Engineering Equipment Co.	Minneapolis, MN	9	7	Minnesota, Colorado, Illinois, Iowa, Kansas, Nebraska, Texas	30e	NA
Manhattan Electric Cable Corp.	Rye, NY	13	11	New York, California, Georgia, Illinois, Indiana, Massachusetts, Minnesota, New Jersey, Ohio, Texas, Washington	NA	NA
Memphis Lamp Co.	Memphis, TN	6	4	Tennessee, Florida, Louisiana, Texas	60	NA
Montroy Supply Co.	Commerce, CA	6	4	California, Arizona, Nevada, Utah	15e	NA
NEIW, Inc.	Berlin, CT	6	6	Connecticut, California, Florida, Missouri, New York, Texas	NA	NA
Northern Wire and Cable, Inc.	Troy, MI	6	5	Michigan, Florida, Georgia, Nevada, Ohio	220	41.5
Power/Mation Div.	St. Paul, MN	6	5	Minnesota, Illinois, North Dakota, Oklahoma, Wisconsin	98	NA
Temple, Inc.	Dallas, TX	7	6	Texas, Colorado, Kansas, Missouri, New Mexico, Oklahoma	65	45.0
Voss Electric Supply Co.	Lincoln, NE	6	6	Nebraska, Illinois, Minnesota, Missouri, Oklahoma, Texas	60	10.0

Notes: The District of Columbia and Puerto Rico are included under the "States" heading.
* "Sales" are 1989 sales given in $ millions. Figures for "Sales" and "Employees" are for electrical wholesale operations only.
e - Estimated by ELECTRICAL WHOLESALING